

## Money Ladder, a Personal Finance Start-Up, Innovates the Customer Experience with Omnichannel Communications



### Background

Money Ladder is a start-up that focuses on helping people not only get out of debt but also plan for specific life goals, such as buying a house, planning for retirement, or saving for their children's education. It may sound like a standard financial planning service, but what sets Money Ladder apart from the competition is treating clients like humans and not just another entry into a spreadsheet. Money Ladder will change the financial industry by truly focusing on individuals and offering a truly refreshing take on the customer experience.

### Challenges

John Ward, a Managing Partner at Money Ladder, saw an opportunity to offer a personalized experience using innovative customer support technologies. Ward's background is not in finance but in the tech sector, where he worked for companies like Apple, Google, and Nest. With this experience, Ward knew that he would need the right people and tools to get the job done. Assembling an agile team of dedicated experts was an important milestone, but now Money Ladder needed a platform that could connect its staff to clients using any number of channels.

### Objectives



Innovative platform with channels of today and tomorrow



100% cloud platform for business continuity and ability to deploy remote agents



Offer innovative channels with a human-first approach



Ability to scale up easily to support start-up growth



100% uptime with active-active architecture and instant access to newly released versions of the platform



Meet the customer where they are on their channel of choice



I really enjoy the Bright Pattern team and their vision of where the platform is going.



## Solution

"I reviewed Bright Pattern's platform two and a half years ago when I was at Nest," explained Ward, adding, "I really enjoyed the team and the vision of where the platform was going."

After starting Money Ladder, Ward took another look at Bright Pattern and noted that it stood out, not only for its robust feature set, but also for the scalability.



The customer support team was phenomenal during onboarding and at showing me the features I couldn't figure out on my own.



## Results

When it came time to implement Bright Pattern's platform, the process was straightforward and smooth. Money Ladder needed a quick turnaround and Bright Pattern delivered. Even for a tech guy like Ward, there were still a few questions with some of the features. "The customer support team was phenomenal during onboarding and at showing me the features I couldn't figure out on my own," exclaimed Ward.

Money Ladder has seen drastic improvements in reporting and supervisory functionality. The management team also loves the new features and feels more in tune with the representatives and their calls. But it's not just the managers that enjoy using Bright Pattern. "From day one, our employees saw the value in the Bright Pattern solution and liked using it," noted Ward. "The positive feedback from end users and agents speaks to the ease of use of the Bright Pattern technology."



Improvement in reporting functionality



Fastest deployment in the industry



Ease of use for admins and supervisors



100% uptime and access to latest technology



Decrease in agent training time



Easy to use omnichannel technology



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